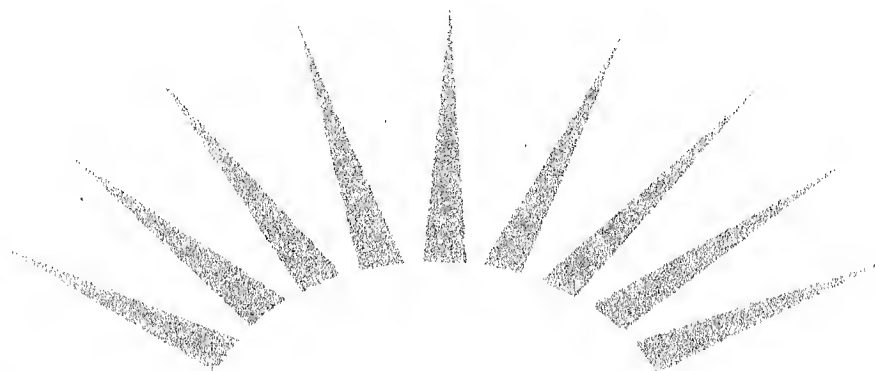


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Focus Study on Human Resources

Manatee County School District

**Florida Association of District School Superintendents
April 2019**

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Florida Association of District School Superintendents

FADSS Mission Statement

The mission of the Florida Association of District School Superintendents (FADSS) is to assist and support superintendents in providing leadership to ensure that every student in Florida acquires the skills, knowledge and attitude to be contributing members of our democratic society through leadership development programs focused on student achievement, building relationships with business and governmental leaders, and communication and networking services.

FADSS Goals

The goals of the Florida Association of District School Superintendents are to:

- Significantly influence the development and implementation of the best possible education practices in the school districts of Florida.
- Assist superintendents in implementing those practices as well as in meeting requirements established by law and regulations.
- Enhance the professionalism and image of Florida superintendents as the Chief Executive Officers of Florida school districts.
- Ensure that superintendents are well informed on current issues and on the plans and actions of State government (executive, legislative, and judicial).
- Promote opportunities for collegial support and fellowship among superintendents in Florida.
- Provide a forum through which superintendents can address State and Federal decision makers on matters which directly impact the membership and the quality of education in their districts.
- Strengthen the statewide influence of superintendents by developing among them consensus on vital issues, accommodating the points of view of superintendents who are both elected and appointed; from large districts and small districts; and from rural, urban, and suburban areas.
- Provide a variety of training and developmental experiences for superintendents for their continuous professional growth.

FADSS Services

The FADSS organization provides personalized technical assistance to individual Florida school districts at the request of the school Superintendent. Such technical assistance can include various forms and dimensions of studies designed to analyze systems operations and to recommend alignment, staffing and best management practices. The goal of any such study is for qualified, outside educators to gather in-depth information about the district so that the Superintendent and the Board can consider the findings and recommendations when making district strategic decisions. It is the hope of the FADSS organization that leadership capacity will be strengthened, district goals will be enriched and student achievement will rise.

Introduction

At the request of Superintendent Cynthia Saunders, the Florida Association of District School Superintendents (FADSS) organized a team of appropriately experienced consultants to conduct a Focus Study on the Human Resource (HR) operation within the Manatee County School District. This Focus Study assesses the current status of the HR Services.

The Superintendent is aware of the current HR challenges and how they impact the District. The intent of this report is to provide the Superintendent and leadership team with a deeper understanding of the services provided by the District's HR function as well as providing a clearer picture of HR's interaction with district employees, schools and departments, and if necessary, recommend ways to improve these services.

In order to complete this study and subsequent report, the FADSS team:

- Was onsite for three days in the district gathering information from appropriate staff such as:
 - Board Members
 - HR Services Personnel
 - Principals and School Staff
 - District Office Administrators
- Researched the online district information and all district documents provided
- Spent time in the office of HR Services

The result of the team's research is a written report on the HR Services, which includes:

- The Status of the current operation
- Recommendations

The team would like to thank the staff of Manatee County for the assistance they provided in the gathering of data without which this report could not have been completed.

Human Resources as a Strategic Partner

The first impression that any individual applicant has of a school district is usually a product of their interaction with the district Human Resource Office. Many long-time educators can remember when the then-named Personnel Office was compliance driven, paper intensive and fairly unresponsive to the needs of individuals and schools. Frankly, the mission was transactional in nature and fairly limited to making sure that folks were paid on time, leave was processed and that records were up to date and secure.

There is a different, emerging view regarding the role of the Human Resource Department (HR) that requires HR to become more customer-focused and service oriented. In Elizabeth Arons' American Association of School Administrators article "Front and Center;

The Role of Human Resources, she states, "If the human resources operation is to be a strategic partner in improving student achievement in a district, it needs to be organized on the quality of the teacher and principal workforce. This requires performance and talent-driven work, not just compliance. Areas of focus include recruitment, hiring/selection, induction/assignment, staffing/deployment, performance management, linking professional development to human resource, compensation and career management." In a presentation to 67 Florida district school superintendents, Arons briefly outlined what the focus on service and the development of human capital should look like. (The information that follows is from Arons' presentation to those superintendents.)

The preceding is not to imply that meeting the basic transactional needs of a school district are not important. However, experience suggests that the HR function must deliver effective services and strategically maximize talent by:

- Offering evaluation and professional development services
- Creating strategies and decisions based on data
- Delivering responsive customer service
- Streamlining processes
- Connecting talent to school requirements
- Differentiating and targeting services based on need
- Developing strong Human Capital Managers

Additionally, Ms. Arons defines Strategic Human Capital Management as work that:

- Contributes to the quality of teachers and principals.
- Enables the principal to focus more on and aligned to instructional improvement.
- Continues to bring schools/principals more autonomy and builds their capacity as Human Capital Managers.
- Can be measured for continuous improvement.

Ms. Arons provides some "Key Indicators" that can be used to quickly determine how strategically oriented their respective HR policies, supports and services are functioning.

- HR goes way beyond transactional work.
- Obtaining the goal of having 90% or greater of principals supportive and complimentary of HR.
- Early contracts are offered in science, math, bilingual, special education or other critical shortage fields with a goal of having 90% of hiring in those fields completed by June 1.
- School opens with a full complement of new teachers onboard and on payroll with fewer than 1% of all vacancies unfilled.
- The lowest performing teachers should be exited efficiently or improved significantly.

- Teachers, especially low performers are not moved or placed from one school to another against the principal's wishes.
- There is a well-publicized deadline by which teachers have to resign and there are consequences for resigning beyond the deadline.
- Hiring process for new principals is finished by May and 100% of superintendent/assistant superintendents/principal supervisors are pleased with the quality and quantity of principal applicants.
- Adding a new hire to payroll is done online and takes no more than 72 hours from start to finish. Orientations to complete transactions are completed online, not in person.
- Principals have access to the applicant pool 24/7 and applicants have access to vacancies online 24/7.
- Investigations of misconduct are completed quickly and efficiently, and there is a very high standard of conduct required of every employee.

This is a very impressive rubric and one that will illuminate deficiencies in an operation delivering HR services in short order. It is the goal of this Focus Study on HR to assist the Manatee County School District to confirm the validity of such a rubric and to create an HR function that is transformational and supportive of the strategic goals of the district.

Principal Survey Results Summary

In November of 2018, after questions had arisen regarding the delivery of services by the district's Human Resource (HR) Department, the Manatee County School District Executive Leadership team surveyed Principals and Operations Division Department Heads to seek their opinions of the HR department's services and support to them. Fifty-three employees participated in the survey. The surveys did not indicate the respondents name, position, or place of employment.

A tally of the survey responses follows, but before moving forward with the summary, it seems prudent to briefly discuss what is expected of effective Human Resource Departments in today's educational world where the expectation is that all children learn at a high level. Such high expectations require Human Resource departments to clearly understand their role in accomplishing these expectations. The information that follows supports the work of Betsy Arons, CEO of the Urban Schools Human Capital Academy (USHCA). Ms. Arons has been providing HR training and support for over 30 years and is well versed on the new vision for high functioning HR departments and the changing roles of Human Resource Department's personnel. The Florida Association of District School Superintendents (FADSS) has provided HR training for Florida's school districts for several years and consultants like Ms. Arons have helped Superintendents and their HR leaders to understand what must happen if HR departments are to align their functions and delivery to the expectation that all students can perform at a high level.

Critical is the need for Human Resource Departments to understand that their primary customers are the principals, but their responsibility is to meet the needs of all of their customers: principals, teachers, district staff, support staff, applicants, and employment inquiries. To lead and manage significant functions such as: analyzing turnover, overseeing Aspiring Principal Programs, cultivating internal candidate pools, utilizing standardized screening processes, following a clear and transparent selection process, collaborating with principal supervisors, onboarding new principals, supporting quality induction of new principals, etc., requires significant commitment on the part of each HR department employee. This is a new way of thinking for HR departments and it requires a new vision for the HR department and the clarification of aligned roles and responsibilities for every employee in the department. As principals focus on their students' learning every day, the employees of the HR department must focus on the principals and their other customers, and how they can ensure that the human resource needs of each school/customer are met efficiently and effectively.

A closer look at Principal survey questions and responses follows:

- A total of 53 principals and other administrators completed the survey. Most of the respondents added additional comments.
- There were a significant number of positive comments about the support and service provided by the HRBP staff person assigned to the individual school. Other positive comments related to the district investigator and the HR director. There were also several respondents that mentioned that the HR staff is friendly.
- Numerous responses indicated that there is a need for improvement in the areas of: recruitment, the application process, onboarding and the retention process.
- No survey question responses rose to the level of 90% satisfaction as Ms. Arons recommends for high performing HR departments. The area that had the highest percentage of satisfaction was: (Q12) Investigations of employee misconduct are completed quickly and efficiently. The percent of those that agree or strongly agree in this area was 62.26% and 30.19% of the respondents recorded a neutral response and no responses indicated disagree or strongly disagree.
- 7.69% to 35.85% responded neutral to every question on the survey. Such significant numbers of neutral responses indicate that respondents may not have a clear vision or expectation for a high functioning HR department, may have never worked with an HR Department that clearly understood that the principal is the primary customer of the HR department or they accept explanations for the HR responsibilities that are not being met.
- There were only three areas where the respondents had more agree and strongly agree responses rather than disagree or strongly disagree responses:
(Q9) I am satisfied with the support I receive from Personnel for improving and or exiting poor or low performers,

(Q11) I know who to call for specific personnel services, and I am promptly notified when there are changes in the department, and
(Q12) Investigations of employee misconduct are completed quickly and efficiently,

Although these were the highest scored questions none of the responses rose close to the level of 90% satisfaction.

- (Q13) I am pleased with the level of customer service I receive from the Personnel Department, had an equal percentage of principals who agree or strongly disagree and those that disagree and strongly disagree with the question. Because the responses were so varied, the question arises: Are all schools receiving adequate support according to their individual school needs?

The following two responses indicate the critical need to focus on recruitment and retention of teachers.

- Responses to the two following questions received above a 70% disagree or strongly disagree score: (Q2) The Personnel Department provides data to me on a regular basis regarding my staff, including staff attendance, staff leave, staff turnover, etc. and (Q5) I begin the school year fully staffed.
- Responses to the two following questions received above a 60% disagree or strongly disagree score: (Q3) I have on-line access to a strong pool of candidates 24/7, and (Q6) The Personnel Department ensures there are viable and well-qualified candidate for my vacancies.

These high percentages of disagree or strongly disagree responses indicate that principal's personnel hiring needs are not being met.

The following two bullets indicate a need to improve the application and hiring process for new teachers and other employees as 50+% of the respondents indicated that they disagree or strongly disagree with the following questions.

- (Q7) Personnel processes are streamlined and on-line for me and my staff, including requisitions for hire, onboarding, certification, etc.
- (Q8) The application process for candidates is user friendly, easy to navigate, and easy to complete.

The inadequacies of TALEO and the implementation of the new ERP system have been suggested as reasons why the Human Resource Department has not been providing services at an acceptable level. Each Manatee County employee, whatever their position, must work within the limitations and challenges found in their scope of responsibilities. Each Human Resource Department employee must be held accountable for their assigned job requirements and an accountability system must be in place to regularly

assess all functions in the department. The services of the HR Department, especially in recruitment of the very best teachers, are too important to allow technology systems to be used as the reason for not providing high quality services.

An inspiring vision for the HR department must be established and a measurable, goal-oriented plan of operation developed. All roles and responsibilities should be clearly established and all HR employees must be held responsible for their assigned job requirements. Utilizing the rule of "No Excuses" will allow all in the department the freedom to do what it takes to serve their customers successfully. Operating from the belief that the principal is the primary customer and their needs must be met, the HR Department can function as the service provider that: fully staff's schools with high qualified teachers before school starts, rapidly processes new applicants, retains high performing employees, ensures that evaluation systems are current and carried out, that Aspiring leadership programs are grooming the kinds of administrators desired in the district, and the list goes on. This is an opportunity to move the Manatee County School District HR division to a high functioning department. Such high stakes require leadership and commitment, but it is doable and necessary.

Pervasive Issues

- It does not appear that the HR Department has a clear focus regarding the primary customer to be served: the school principal.
- Communication within the HR Department as well as between HR and other departments is not always clear or consistent. School based administrators do not receive timely information related to issues or changes that affect his/her work site. Communication issues are negatively impacting effectiveness and efficiency as well as the perception of the Human Resources Department. A recent example was the utilization of a new pay stub related to the People Soft implementation. No overview or training was provided to staff and employees; thus, many questions were directed to staff in both HR and Payroll to explain the nuances of the new paystub.
- There appears to be an "us vs. them" mentality between the HR Department and the schools they serve. It appears that schools often view HR as an impediment rather than a vehicle to assist them in their everyday responsibilities. The perception of the HR Department by its customers appears to be that the staff is more concerned with their process and compliance than the service to their customers especially at the time the service is needed. Although the schools generally know who to call for specific information, the level of customer service is

average at best. It must be remembered that the first impression of a school district is more often than not the individual's interaction with an HR staff member.

- The transition between TALEO, People Soft and the ERP has not been a smooth one. There does not appear to be any specific HR staff member who has been trained in People Soft query writing. The ability to produce reports for school sites is a challenge.
- An immediate need for People Soft training for HR staff is a critical need.
- There is a lack of decision making and decisiveness coming out of the HR Department resulting in a lack of responsiveness to concerns.
- Updates to and/or formal approval of necessary HR documents such as the employee handbook, pay plan guidelines, the HR Personnel calendar, the Personnel Services Resource Manual for Administrators and exit / stay surveys have not been completed.

Human Resources Staffing and Organization

Status:

The HR Department consists of Personnel/Human Resources as well as the Risk Management and Benefits Departments. The current breakdown of positions is as follows:

Human Resources/Personnel (23 positions):

Chief Human Resources Officer
Director of Personnel
Diversity and Recruitment Coordinator
Certification & Personnel Coordinator
Senior Data Strategist
Employee/ Labor Relations Specialist
HR Operations Analyst
HR Personnel Representative/ Business Partners (HRBP) (5 positions)
HR Personnel Specialists (3 positions)
Certification and Instructional Specialists (2 positions)
Position Control Specialists (2 positions)
Smart Find Operator
Secretary
Front Desk Secretary

Administrative Secretary to Chief HR Officer

The leadership of the Human Resources/Personnel Department is currently assigned to the Chief Human Resources Officer. There appears to be a direct line of reporting to the Chief HR Officer from the Director of Personnel, who then is responsible for the HR functions related to personnel. Thus, the HR Personnel Representatives (HRBP), HR Personnel Specialists, Certification Specialists and Position Control Specialists are supervised by the Director of Personnel. The HR Operations Analyst and Senior Data Strategist positions appear to report directly to the Chief HR Officer.

The duties of the HRBPs and the 5 HR personnel specialists are divided up by school sites and departments. Each position is responsible for a set group of schools and/or departments. This process was established in January of 2018 and appears to be working well so far. The Benefits department initially tried this same alignment but have changed back to a division of duties based on the last name of the employee (A-L or M-Z). Since there are only two benefits specialists assigned this way, the process is working efficiently for the staff and employees.

The majority of the HR staff have been in his/her respective position for 4 years or less. There has been much turnover both in leadership positions as well as general HR staff. As a result, a clear delineation of duties and responsibilities has not yet been fully implemented. There also appears to be a lack of consistency in performing similar processes which would indicate a need for additional training in People Soft.

Recommendations:

The duties and responsibilities for each HR staff member must be clearly defined. The current "Who to Call" must provide more detailed information regarding each HR employee's primary areas of responsibilities. In addition, all information (area of responsibility, email address and telephone number) should be accessible in the same area. The current who to call list is divided into two sections, one lists email addresses and the other lists telephone numbers. It should also be noted that position titles are often different such as listing a position as a "manager" on the email listing and later as a "director" on the telephone listing. (NOTE: This recommendation is also listed in the section "SUGGESTIONS FOR IMMEDIATE IMPLEMENTATION".)

Better communication within the department was an area that was frequently cited as needing improvement. Staff members felt they were often not informed of changes related to HR thus the schools/departments they served were also not up to date on changes to any procedure or process. Although there were efforts to have regular staff meetings, it is critical to establish a process for the dissemination of communication related to all HR staff.

As recommended in the section entitled "SUGGESTIONS FOR IMMEDIATE IMPLEMENTATION", improved customer service can be quickly achieved by raising the expectation of responding to phone calls and emails.

Update all pertinent HR documents (such as calendars/timelines and procedural manuals) and distribute them to affected customers on a regular basis.

The implementation of People Soft has resulted in more interaction between the HR and Payroll departments. The pros and cons of a consolidation of the two departments should be explored. A strong working knowledge of what each department does and the implications of incorrect data input will benefit both departments.

At the same time, the feasibility of moving Risk Management from beneath the HR umbrella should be examined. Since the Benefits department currently exists independent of any risk management oversight, such a move could be accomplished with minimal effort.

Training (or the lack of) was cited consistently as a pressing need. HR staff will embrace the opportunity to learn the intricacies of the People Soft system. It appears there are no formalized set business practices. The HR staff should be provided with the tools and the leadership to be successful in their jobs.

There appears to be a lack of communication and understanding between the HR, Benefits and Payroll departments concerning the impact of the work each department is responsible for in People Soft. For example, if HR enters an incorrect pay grade for a new hire, it has implications for both Payroll and Benefits.

An annual report of the services provided by the HR Departments should be developed and shared on a yearly bases to the School Board, Superintendent, principals and other HR customers.

Risk Management / Benefits

Risk Management (3 positions):

Director of Risk Management and Benefits

Risk Management Specialist (2 positions)

Employee Benefits (10 positions):

Employee Benefits Manager

Employee Benefits Specialist (3 positions)

Absence Management Analyst (2 positions)

Retirement Specialist (2 positions)

Payroll Deduction Specialist

Employee Benefits Assistant

Status:

Although the Risk Management and Employee Benefits are assigned to the HR Department, both departments appear to be run independent of HR and thus are assigned essentially in name only. In addition, the same situation exists with the Risk

Management and Benefits areas. The two departments operate independently of one another and the leadership of the Benefits area is assigned to the Employee Benefits Manager.

The Risk Manager is responsible for risk management related responsibilities such as property casualty insurance and claims, workman's compensation and workman's comp litigation, student accidents and updating the hurricane manual. The departments of Safety and Security and Benefits were moved under the Director approximately 5 years ago.

The Benefits Department is responsible for all benefits offered by the Board including medical, dental, vision, short- and long-term disability, term life insurance and various other voluntary insurance products. In addition, the department handles various pretax deductions to retirement plans and flexible spending accounts. There are two sick leave banks that are monitored by the department as well as the processing of terminal payouts for vacation and sick leave.

The Benefits Department is fortunate to have a payroll deductions specialist who possessed previous experience with the People Soft system and has the basic knowledge and ability to write queries that have assisted both the Benefits and the HR departments. Besides this individual, however, there is currently no consultant assigned to the Benefits/HR department to assist them with the ERP (Enterprise Resource Planning) system.

Recommendations:

The Risk Management department has little interaction with either Benefits or Human Resources. Since Safety and Security is also assigned to it, the reassignment of Risk Management and Safety and Security to another operations area should be strongly considered.

There should be a full-time consultant /liaison who assists the HR and Benefits departments with the People Soft implementation process. Multiple employees should receive People Soft query training.

The Benefits department should coordinate with HR concerning the possible re-establishment of large group new employee orientation sessions where benefit information can be distributed and reviewed.

Human Resources Processes and Procedures

Job Vacancy Postings

Status:

Once a position vacancy is confirmed by Position Control, it is posted on line. The applicable job description is attached to the posting. The current teacher contract requires a 10-day posting period from the first workday in April through July 1st.; a 5-day posting period from July 2nd through the remainder of the school year, with an exception for vacancies that occur from 5 days prior to the teacher's first workday through 5 days after the student year begins. These vacancies are posted for 2 days. It should be noted that a memorandum of understanding was signed on October 23, 2015 that changed the 10-day posting requirement to 5 days and modified the posting location requirements to post electronically rather than a written format. This MOU was not inserted as part of the 2017-2020 contract, thus job vacancy postings from April through July have reverted back to the 10-day time frame.

It was unclear if job vacancy postings for positions where the employee is on extended leave are indeed advertised as "leave" positions.

Recommendations:

Discussions should be held with the teacher bargaining unit as soon as possible concerning reestablishing the language regarding job postings that was agreed to as a memorandum of understanding in 2015. The current shortage of teachers combined with the number of vacancies posted by surrounding school districts make the current 10 day posting requirement a deterrent for filling teacher vacancies in Manatee County. (NOTE: Prior to the final printing of this report, an updated Memorandum of Understanding for the remainder of the 2018-19 school year has been agreed to by the District and the Manatee Teachers Association as of 5/9/19 that will reinstate the 5-day posting process from April through July. It is expected that all parties impacted by this change will be notified immediately.)

The practice of requiring that a job description be attached to a job vacancy should be reviewed and eliminated unless absolutely necessary. Currently when a job vacancy is posted, an incorrect job description is too often attached due to the utilization of the state job code versus the local job code or the linking of the vacancy to an old job description that apparently is still in the system. Since all job descriptions are already accessible on the HR website, it is unclear why a job description must be attached to a job vacancy. If the current requirement is causing a delay in the job posting process, it should not be mandatory. In any event, the job descriptions listed on the HR website should be reviewed for accuracy and old versions should be removed.

Application Process

Status:

The TALEO system is utilized for the application process. Staff reports that a large percentage of the phone calls they field are from applicants (both internal and external) who are having problems with the TALEO system. The system does not tell the applicant the actual status of their application. In addition, many applicants encounter problems

downloading a resume, transcript or other necessary information. The applicants are allowed to download a blank sheet of paper in order to continue the application process. As reported by both HR staff and newly hired staff, the system is not user friendly and is not compatible with the People Soft system.

Recommendations:

Every effort necessary should be completed to link the TALEO and People Soft systems together. An on line checklist should be created to allow an applicant to see the status of his/her application with the county.

Hiring / On Boarding Process

Status:

When a principal/hiring manger has selected an applicant to fill a vacancy, the selection is reported first to the Human Resources Department. An offer email is then generated by HR and sent to the applicant with a three-day window to accept or decline the job offer. If the applicant accepts the offer, then a second email is sent with information regarding the hiring steps including fingerprinting, drug testing, experience verification, loyalty oath and other necessary documents. Once fingerprint and drug test results are received, the new hire is cleared to begin. A personnel action form is completed by the hiring school/department.

With the exception of receiving the information on fingerprinting and drug testing, there is no face to face interaction with the new hire. Hiring managers report that there is no information sent to them concerning a new hire's status and start date, except when the IT department requests technology access and provides an employee ID and log in.

For clearance of instructional new hires, the principal is to contact the certification office for the determination of in field or out of field status. It did not appear that this component of the clearance process was always followed. As a result, the number of out of field teachers is increasing. Per staff, the current number of out of field teachers is approximately 100.

Fingerprinting is completed both in house (at the District office) as well as off-site locations. As viewed by the hiring managers, the current new hire on boarding system is cumbersome and labor intensive. The entire process from job posting to completing the on boarding process is too often 3 or more weeks.

Recommendations:

It is unclear why the HR Department is the entity that makes the initial job offer when it is the principal/hiring manager who is making the selection. In addition, the three-day response window for the applicant to respond is three days of inactivity in the on boarding

process. An alternative model could be as follows: 1) Principal contacts certification office for certification clearance. If out of field, approval from applicable director is secured prior to job offer; 2) Principal contacts candidate and offers position. If accepted, principal contacts HRBP requesting time and date to be fingerprinted, drug tested and to meet with assigned HR/Benefits staff to complete paperwork.; 3) Principal submits personnel action form; 4) When fingerprint and drug test results are received, HR contacts Principal to determine effective start date.

If a new hire comes to the county office to pick up drug testing information, he/she could be fingerprinted in HR at that time. If this is not possible, then an off-site location could be utilized.

During the summer/preschool peak hiring season, large group new employee orientation sessions should be scheduled which could help expedite the onboarding process and provide face to face interaction between the new employees and representatives of the HR, Benefits and Payroll departments.

Allocations / Position Control

Status:

The two position control specialists maintain employee rosters for every school site. In the spring of each year, schools are sent a "p form". On this form the principal will identify those who will be recommended for contract renewal/non-renewal, those individuals who may be over allocated and need placement based upon the allocations provided for the next school year and those employees who may have filed for an extended leave for the upcoming school year.

Recommendations:

The responsibility for monitoring class size should be assigned to the HR department with the assistance of the IT department. It should be noted that two schools did not meet class size requirements for the 2018-19 fall survey. The class size ratios by school should be carefully reviewed in light of the number of schools who were well below the school average of 18, 22 and 25 respectively and the fact that the two schools were not in compliance with the school averages.

The individual meetings with each school to review the employee rosters in detail should continue. All parties involved, especially the schools (where the principal and administrative secretaries were involved) were very complimentary of this process.

26 VS 24 PAYCHECKS

Status:

Employees are currently paid the 10th and 25th of each month. If the 10th and/or the 25th fall on a non-workday, the pay date reverts to the closest workday, such as the 8th, 9th or

24th. The 10th pay date covers the days worked from the 16th through the end of the month and the 25th pay date reflects days worked from the 1st through the 15th of the month.

Since each pay date covers a predetermined number of days, hourly employees receive paychecks that are not a uniform amount. The days worked in each pay period may differ, thus impacting the amount of the check. In addition, often the checks issued in December and January are adjusted if the employee has insurance benefits deducted from his/her paycheck. In some cases, the amount of the deduction may exceed the amount of the check. Thus, the employee may not receive a check in December and have a small check in January in order to cover the remainder of the amount due for December's deductions. Instructional staff have their pay divided into 24 equal installments. They are paid either in 24 equal checks over a 12 month period, meaning checks are held to be paid for June (1 check), July (2 checks), and August (1 check) or they are paid the equivalent of five paychecks on June 10th (unless the school year ends in June, which means this check will be issued on the 25th). This method involves paying instructional staff for days they have not yet worked but later hold back funds for days already worked in order to create the checks for June, July, and August). Currently deductions are taken from each of the 24 checks.

Recommendations:

It is strongly recommended that the District review the possible advantages to both the school system and its employees of moving to a 26-paycheck model where pay dates would be every other Friday. In addition, the possible advantages of taking deductions in 20 equal installments rather than 24 should be reviewed as well. Some possible advantages are listed below:

- 26 Paychecks are paid on a consistent basis (every other Friday vs. the 10th and the 25th which can fall on any day of the week and does not always fall on a 10th or 25th). In 2018-19, 7 of the 24 pay dates did not fall on the 10th or the 25th. In 2018-19, three full checks were issued in November of 2018 and May of 2019 under the 26-paycheck model.
- The 26 pay model establishes a uniform pay schedule for all employee groups which provides employees with an opportunity for consistency and regularity as they address monthly/annual financial obligations. Additionally, having an "every other Friday pay schedule" establishes consistent deadline dates for school and district staff who impact the payroll process. Every employee group who begins work in August receives a paycheck at the next regularly scheduled pay date. For example, 196-day employees this year began work on 8/6/18. The 24-pay model did not issue a check until 8/24/18 whereas the 26-paycheck model issues a partial (.5) check on 8/10/18.

- In order to receive the equivalent of five (5) paychecks on June 10th per the MEA contract, more money is held back until the end of the school year. For example, the 24 pay model issues 9 checks from August to December. The 26 pay model issues 10.5 paychecks over the same time frame in 2018.
- A 20-deduction process for benefits and union dues and should be implemented at the same time as the 26-paycheck model. This will establish a process by which no deductions will be taken for the partial checks in August and June as well as the 5 full checks in late May and June. The 24 pay periods currently take deductions out of each paycheck. The 20 deductions will result in more take home pay for the 6 additional checks.
- The 26 pay check method results in 25 full paychecks verses the 24 issued every 10th and 25th.
- The 26 pay check method will eliminate the issues for support employees who yearly are paid in December and/or January but do not earn enough pay to cover their deductions and must have additional money deducted to make up for the deficit in his/her next check.
- If the 26 pay method were adopted for support employees, it could be offered as an option for instructional staff replacing the 24 paychecks that are currently paid over a 12-month period. The other option for instructional employees would be to be paid over the dates of the 196 contract which would result in a partial check in August and June and 21 full checks during the contract year. In either option above, the pay dates would be every other Friday.

Annual Reappointment Timeline and HR Calendar of Events

Status:

Prior to the on-site visit, the FADSS consultants were provided with a DRAFT copy of the HR Personnel Hiring Timeline for 2019. That timeline reflected detailed information that related to a variety of events or functions that included but was not limited to job fairs, dates for sending P-Forms, dates by which certain HR functions were to be completed, dates by which certain contractual requirements had to be addressed, meetings with principals, 10-day vacancy posting time periods, 5-day vacancy posting time periods, 2-

day vacancy posting time periods, etc. It was unclear if a final version of the timeline was ever approved, or if principals and department heads received a copy of the final timeline.

Based upon the timeline and from information obtained during staff interviews, it was determined that the annual reappointment process begins with establishing projected student enrollment for the following year in or around February/March of each school year. Subsequently those student enrollment projections are used to set the base allocations for position control that is maintained and controlled within the HR Department. From information obtained, the school principals and department heads receive information and direction from the HR Department related to the submission of their recommendations pertaining to the reappointment of staff under their supervision in or around April of each school year. It was reported that the normal timeline that addresses staff reappointments for the 2019-2020 school year was somewhat delayed this year due to the opening of 3 new schools. This delay is understandable. Even with the delay, the district was well underway with the annual reappointment process and were in the posting period for vacancies that had been identified for the upcoming school year.

At the time of this on-site review, HR staff were in the process of preparing a School Board agenda item pertaining to the reappointment of instructional and support services employees. It was reported that the annual reappointment of the remaining employee groups would be processed and placed on the agenda during a subsequent School Board meeting.

As the current year's recommendations for reappointment were not finalized at the time of the FADSS's on-site visit, the consultants reviewed the reappointment agenda item and a list of accompanying personnel recommendations from the previous school year for a sampling of schools, etc. It was determined that a specific agenda item recommending the reappointment of certain designated staff such as instructional and support services staff was presented to the School Board for approval. However, the accompanying list of employees which were recommended for reappointment was not a part of the agenda packet. The agenda item indicated that the list of those employees was available in Room 533 and is available for review by School Board members prior to the meeting in which the Board is asked to take action on the Superintendent's recommendations. This same process was followed regarding the reappointment of all other staff.

Upon review of the employee listings that were found in room 533, it was determined that each school would have a listing of Teachers and Paraprofessionals who were recommended for reappointment for the 2018-2019 school year. That particular school listing provided a position title and the names of employees in that position. A listing for SAMP and Non-Bargaining Hourly Employees for a particular school who were recommended for reappointment for the 2018-2019 school year only provided the school

name and a listing of employees at that school. However, the listing of reappointments for the 2018-2019 school year for AFSCME employees reflected the school/cost center name, the employee's name, job title and months of employment or hours worked.

Recommendations:

The annual reappointment process is one of the most impactful, complicated and detailed functions that are conducted by any school district. One cannot underestimate the detailed complexity that school principals are faced with on an annual basis as they evaluate and determine their staffing/instructional needs for the following year. Understanding the importance of this function, and understanding that it is critical that all school principals and department heads be involved in the process from beginning to end, it is recommended that the HR Department, in conjunction with the Superintendent and the executive leadership team, ensure that an "Annual Reappointment Timeline" be developed and adopted each year. This timeline should be provided to school and district level administrators well in advance of the initial activities which are associated with this process. Once established, the timeline should require only slight modifications from year to year.

It is further recommended that the HR Department establish a specific "HR Calendar of Events" that identifies specific dates and timeframes that are associated with the annual functions and processes of the department. There are countless HR functions that must be performed by the department staff from the beginning of the year to the end of the year. This timeline will ensure that all department functions are addressed, planned for in advance and are completed in a timely manner.

With regard to the Annual Reappointment Timeline, it is recommended that this timeline address but not be limited to the following: determining student projections for the subsequent year, establishing allocations for staff to support those student projections and other priorities set forth in the Strategic Plan, identifying dates-times-locations for principal/supervisor meetings related to re-appointments, instructions and dates related to the submission of reappointment recommendations, validating that reappointment recommendations comply with position control data, an outline of relative HR functions associated with processing staff reappointments, references to pertinent union contract language related to certain contractual requirements, establishes a date(s) for notifying probationary and annual contract staff of their reappointment status, identifying vacancies for the subsequent year, identifying a period of time for staff reassignment as needed, setting vacancy advertisement period(s), Board action related to reappointments, the preparation and issuance of contracts for employment as applicable, etc.

It is imperative that these reappointment timelines/calendars provide for a vacancy advertisement period that begins well before the end of the school year, and that the HR department place, as its top priority, the timely posting and processing of all vacancies.

As noted above and in the section entitled Suggestions for Immediate Implementation, the HR department prepared a draft version of a calendar entitled "HR Personnel Hiring Timeline 2019". This calendar could be utilized to create the type of document outlined above.

It is somewhat concerning that the reappointment listings for instructional staff does not reflect the contract status of each teacher or other instructional staff who is being recommended for reappointment. With regard to the listing for SAMP and Non-Bargaining Hourly Employees there was no indication of the position title for which each employee was being recommended to fill, and no indication of the length of contract (months or hours) for the employee. As an example, one cannot determine from a particular school listing if an individual is being recommended for reappointment as a Principal or an Assistant Principal, etc. Therefore, it is recommended that district leadership review this process with legal counsel to determine if the appropriate reappointment/contract information is being presented to the Board for their action to ensure compliance with statutory requirements.

Employee Evaluations

Status:

Over the course of the interviews that were conducted during the on-site visit, the FADSS consultants were informed that annual performance evaluations for some district level administrators and/or other support staff were not performed since the beginning of or following the 2012 school year. However, based upon follow-up information that was received, it was determined that annual performance evaluations are now being conducted on all employees.

Recommendations:

In part, FS 1012.34 states that "the district school superintendent shall establish procures for evaluating the performance of duties and responsibilities of all instructional, administrative and supervisory personnel employed by the school district." In addition, 1012.34 reflects language that addresses the evaluation system approval and reporting, the evaluation systems requirements, the evaluation procedures and criteria, notification of unsatisfactory performance, and several other requirements. Therefore, it is recommended that senior level administrative staff review in detail the requirements of FS 102.34 to ensure current and future compliance as this is an item that is reviewed during State audits.

Personnel Files

Status:

The HR department maintains a personnel file for each individual who is employed by the district. Additionally, it was reported that each school or department maintains a personnel file for each employee at that particular cost center. Based upon input received from school staff, it was determined that there are no specific procedures that have been communicated to them to address what actions are to be taken when an employee at the school terminates employment with the district or transfers to another school or a district level department. It was reported by some school staff that they maintain the personnel files of a previous employee for a number of years while others indicated they may send the personnel file to the HR office, or to the employee's transfer school.

Additionally, a review of applicable contract language that addresses personnel files indicates in part that: "Any file kept by an immediate supervisor shall contain only those materials for current evaluation data."

Recommendations:

In order to be compliant in response to a public records request, it is imperative that Florida school districts have specified procedures that apply to the contents and maintenance of an employee's personnel file. In part, FS 1012.33 states that the term personnel file means all records, information, data, or materials maintained by a public school system, in any form or retrieval system whatsoever, with respect to any of its employees, which is uniquely applicable to that employee whether maintained in one or more locations.

Therefore, for compliance and consistency, it is recommended that the HR department establish written procedures that address the management of an employee's personnel file during times when the employee is employed at a particular school or cost center, at the time that an employee transfers from one cost center to another, and/or when an employee terminates employment with the district. These procedures should also address the expectations pertaining to maintaining documentation that addresses employee discipline, performance, etc. Subsequent to establishing these procedures, it is imperative that those procedures be communicated to all school and department administrators.

Instructional Staff / Contracts of Employment

Status:

Upon review, it was determined that the district issues instructional personnel probationary and annual contracts of employment based upon the individuals service and eligibility to receive such contract pursuant to applicable Florida Statutes.

It is also noted that instructional staff members who were recommended and awarded a professional services contract in previous years under then applicable statutory language, are still issued a PSC printed contract on an annual basis.

From an examination of the annual reappointment records, it appears that the HR department prepares and submits to the School Board a listing of all instructional employees who are employed at a particular school and who are recommended for

continued employment for the subsequent school year to include those instructional staff members who were previously issued a PSC contract and those instructional staff members who may still hold a continuing contract. However, as addressed as a separate item in this report, those annual reappointment listings do not identify the type of contract of employment that is being recommended to the Board for approval.

Recommendations:

As the annual reappointment listings do not designate a "contract type" for the instructional employee who is being recommended for reemployment, it appears that Board action is taken each year to approve the renewal or continuation of professional services contracts and possibly continuing contracts for active instructional staff employees who earned such contracts under previous Florida Statutes. Current statutory language indicates that a professional service contract "shall" be renewed each year unless the employee is charged with unsatisfactory performance; the employee receives two consecutive annual performance evaluation ratings of unsatisfactory under s. 1012.34, two annual performance evaluation ratings of unsatisfactory within a 3-year period under s. 1012.34, or three consecutive annual performance evaluation ratings of needs improvement or a combination of needs improvement and unsatisfactory under s. 1012.34. Also, an employee who holds a continuing contract status "shall" be entitled to retain such contract and all rights arising therefrom as prescribed by rules of the State Board of Education adopted pursuant to s. 231.36, F.S. (1981), unless the employee voluntarily relinquishes his or her continuing contract or there is cause to return the employee to annual contract or terminate the employee pursuant to applicable Florida Statutes.

Florida Statutes indicate that professional services and continuing contract employees shall have an expectation of continued employment unless otherwise notified pursuant to the applicable provisions of Florida Statutes. The current practice of preparing personnel action items that are presented to the Board surrounding the annual reappointment or renewal of professional services and continuing contract employees followed by repetitively issuing professional services and/or continuing contracts each year is time consuming and places an additional unnecessary workload on HR staff members.

Therefore, it is recommended that the Superintendent request a review of this practice by the district's legal counsel to determine if addressing the reappointment or renewal of PSC and CC institutional staff members on an annual basis is necessary.

Employment History / Reference Checks and Screening

Status:

Currently, individuals who are interested in applying for a posted position vacancy within the Manatee County School District must make application through the on-line system TALEO. As part of that application process, the applicant must obtain and download three

(3) written references via the established electronic submission process. The three references are viewable by hiring managers once the application is complete and the interested applicant applies for a specified position. This practice of requiring an applicant to provide three references is considered an acceptable standard and mirrors other Florida school districts.

It was also determined that school principals and senior hiring managers are aware of and do conduct the required "last employers" reference check(s) on instructional and school administrator applicants as required pursuant to FS 1012.27 (6) before making a job offer and recommending employment. The FADSS consultants were provided with a copy of the "Employment History Check Form" that is used in Manatee to document this requirement.

Additionally, it was confirmed that staff within the HR department conducts the required employment screening for newly hired instructional and school administrators via the DOE's Teacher Certification Database as also required in FS 1012.27 (6).

However, based upon responses provided from staff interviews, the FADSS consultants were not able to confirm that the screening of instructional and school administrator by accessing the Professional Practices' Database of Disciplinary Actions Against Educators site is being conducted prior to the employment of such staff.

Recommendations:

As indicated above, FS 1012.27 (6) requires that all instructional staff and school administrator applicants who are recommended for employment be screened by checking the Professional Practices' Database of Disciplinary Actions Against Educators site. As this screening check is not being performed by the district, it is highly recommended that procedures be immediately put in place to comply with this statutory requirement with regard to all future employment of instructional staff and school administrators. Additionally, it is further recommended that any current instructional or school administrator who is employed under a probationary contract be screened via this site.

Going forward, the leadership within the HR department should develop written procedures to ensure that consistent compliance with the requirements which are identified in FS 1012.27 (6).

Exit Interview Surveys

Status:

Currently, the district does not use exit interview surveys or questionnaires for employees who separate employment with the district. However, when discussing this topic with HR representatives, it was determined that "DRAFT" versions of an Exit Survey for Classroom Teachers, an Exit Survey for District Staff (Excluding Classroom Teachers) and a Stay

Survey for District Staff have been developed. Additionally, based upon the plan summary sheet, it was determined that they were developed on or about April 16, 2019, and was identified as a High Level Project Plan. Details of the plan addressed the: Project Description, Project Justification, Purpose, Scope-Timeline-Deliverables, Critical Staff Required, Constraints/Assumptions and Know Risks and Project Failure Points. It is noted that the questions contained in each survey are well designed to collect valuable information relative to why employees may leave the district and why employees choose to remain employed in the district.

As indicated on the plan summary page, Principals, Assistant Principals and Supervisors will be responsible for having the surveys completed with help from the HR staff as needed. It appears that the survey would be completed by using a survey link that would be available for use by the Principals, Assistant Principals and Supervisors. It was unclear as to whether the administrator would have to enter the staff member's answers to the questions themselves or that the individual staff member would be able to enter his/her responses. Additionally, there was no indication of when the use of the surveys would begin.

Recommendations:

It is recommended that implementation of these surveys be initiated as soon as possible. The Exit Survey will be a very valuable tool in identifying any common factors that exist which influence staff members to end their employment with the district for reasons other than normal reasonable separation reasons such as retirement, relocation, etc. Should the data collected identify that certain negative factors influenced the separation of employment, then corrective strategies must be developed to address those concerns.

In like fashion, the Stay Survey will help in identifying the major reasons that employees choose to remain employed in the district. The data collected from the Stay Survey should also be reviewed for inclusion into the district's recruitment materials as it will certainly reflect the positive aspects of employment in Manatee County.

Additionally, it is recommended that the implementation of these surveys be conducted in a manner that will be the least intrusive on school administrators. Many school districts conduct this type of surveys in a fully automated manner whereby the employee can access the online survey once by use of his/her employee ID. This method also provides for a more confidential setting in which to complete the survey.

Employment Separation / Termination Checklist

Status:

As indicated in the previous item, it is recommended that the district implement the Exit Interview Survey. In connection with this item, and based upon information received during the on-site interviews, it was determined that a limited number of district level

departments are notified when an employee terminates their employment with the district once action is taken by the School Board. It appears that any form of formal notification of an employee's termination is transmitted to and within departments that include some members of the HR staff, the benefits staff and the payroll staff.

Recommendations:

Instructional and support staff employees within any school district have access a wide variety of district files, district data systems, procurement cards, ID cards, electronic devices, and district facilities to name a few. It is important that school districts have a formal electronic notification process in place when an employee separates from employment. Having such a process will ensure that the separation process goes smoothly for the employee as well as protecting the district from a variety of standpoints.

Therefore, the district should consider expanding their current notification of separation process to include various departments who have a need to know. In many HR data systems, electronic notification of an employee's termination is automatically submitted to multiple staff and/or departments at the time the employee's termination is keyed into the data system in HR.

Should the district wish to proceed with this recommendation, a sample Employee Separation Checklist is provided below:

Sample - Employee Separation Checklist

(NOTE: Responsibilities for each item may vary by school district)

- Obtain keys (building, athletic fields, office, desk, district vehicles).
- Obtain ID card, building access card(s) and/or badge(s).
- Obtain district property (laptops, cell phones, books, disks/manuals, etc.).
- Obtain district credit card, purchasing card, copy card, phone card, etc.
- Computer Access:
 - The supervisor and the separating employee share in the responsibility to identify and transfer any student information and business-related e-files, documents or emails to a folder that can be accessed by others after the employee has separated.
 - The IT department must be informed of all changes relative to access, district folders, distribution lists, web changes, etc.
 - Employee's network access closed effective on employee's last duty day.
- Voicemail – insure that voice mail is reprogrammed and password changed to allow access by supervisor; employee provides supervisor with new password OR disconnect phone service through Communications Resources.
- Resignation, release, or termination letter received.
- Complete all HR separation forms as needed.

- Employee's performance evaluation completed.
- If termination is involuntary, assure that performance issues and/or disciplinary actions are placed in the employee's district HR personnel file.
- Ensure HR/Payroll are informed in a timely manner of last day worked, any leave with/without pay, etc., so as to ensure overpayments and a correct final payout.
- Remind employee to contact the Benefits Department so that retirement forms (if applicable), COBRA forms, etc., are completed and signed as needed.
- Memberships on committees and professional district organizations are canceled or transferred.
- Forwarding address are obtained from the departing employee.
- Exit Interview Questionnaire has been sent to or obtained from the departing employee.
- Eligibility for re-employment and impact related to the Florida Retirement System is explained if applicable.
- Departure is communicated to school/department staff.

Professional Standards / Discipline

Status:

The School Board of Manatee County has adopted comprehensive policies that address the areas of Standards of Ethical Conduct, Educator Misconduct, Complaints Against Employees, Anti-Harassment, etc. Additionally, during the on-site visit, the FADSS consultants were able to review materials and documents that support these policies to include, but not limited to a Child Abuse Reporting Form, Procedures for Reporting Child Abuse, Reasonable Suspicion Drug Testing, Absentee Management, and a Framework for Progressive Discipline.

Based upon information obtained during this study, the Coordinator of Labor Relations conducts investigations in matters of employee misconduct when such cases arise. Depending on the nature of matters that arise in this area, she is at times supported by an as needed contracted retired law enforcement officer. Both of these individuals work closely with the district's legal counsel. It was found that the Coordinator of Labor Relations is heavily involved in assisting school-based administrators navigate through issues involving employee misconduct and/or performance issues, and is very supportive by providing guidance when needed. Additionally, she addresses and responds to complaints surrounding harassment, discrimination, equity issues, etc.

It was reported that there are times when school-based administrators are unsure of who to call for assistance when they are in need of some support surrounding employee misconduct issues. It was also reported that there are times when an employee who is performing at a less than satisfactory level or is involved in some form of misconduct is

transferred from one school to another, and there is concern that the performance or misconduct issues are not properly addressed.

Based upon the information provided, the district has an established Discipline Committee that reviews cases of employee misconduct which rises to the level of discipline which might support a suspension and/or termination. The committee consists of the appropriate Deputy Superintendent, a member of the district's legal team, and the Chief HR Officer. It was noted that the individual who investigated the employee's misconduct (either the Coordinator of Labor Relations or the contract retired law enforcement office) provides their investigative report to the committee members, but they are not in attendance when the Discipline Committee meets to make a determination regarding the appropriate discipline to be recommended to the Superintendent.

As addressed previously in the Principal Survey Results Summary section of this report, the area that had the highest percentage of satisfaction was: (Q12) Investigations of employee misconduct are completed quickly and efficiently. The percent of those that agree or strongly agree in this area was 62.26% and 30.19% of the respondents recorded a neutral response and no responses indicated disagree or strongly disagree.

Recommendations:

In order for the Manatee County School District to achieve its maximum potential it is essential that the highest standards of professional conduct and job performance are in place for those who work for the district. The standard is set by the Superintendent and the Board and that standard must be enforced consistently and in a consistent and equitable manner. The issue of addressing employee misconduct and unsatisfactory performance is extremely time consuming, and in many cases can be legally complicated. For these reasons, it is imperative that school administrators and department heads continue to be provided with meaningful training and support as they address these issues.

At the conclusion of this study, it was unclear as to what level of employee misconduct is investigated and handled at the school/department level as opposed to being investigated and addressed by the HR department or the contracted investigator.

It is recommended that the following items be reviewed by the district level senior leadership team to ensure that appropriate processes and/or procedures are established, preferably in writing, to solidify these items in order to ensure consistency in application per established policy and rule:

- Review the current process for investigations with staff and principals and revise as needed.
- Clearly define the role of the principal or department head in reporting and/or conducting investigations especially in cases of alleged child abuse.
- Determine the level of employee misconduct that will be investigated and addressed at the school/department level with guidance from the HR department.

- Determine the level of employee misconduct that will be investigated and addressed from the HR department or the contracted investigator.
- Review and revise, if needed, the procedure for supporting or dismissing low performers.
- Determine in what type cases is involvement/guidance by the district attorney required.
- If not currently in place, establish a system to bar or flag employees who have been dismissed for misconduct to ensure they are not eligible for re-employment.
- Establish specific procedures that address the record keeping expectations and requirements related to disciplinary actions that have been applied to an employee at a school or department.
- Establish timelines to completion investigations and provide the Superintendent or his/her designee with weekly updates on the status of ongoing investigations.
- Update principals and department heads annually on legislative changes and review procedures that impact the area of professional standards.

Once these and related issues are finalized, the district should consider developing an administrative guidelines handbook which is focused on the area professional standards and discipline to include, but not be limited to, topics such as conducting investigations, documenting for discipline, progressive discipline, just cause, suspensions from duty, preparing disciplinary letters, addressing an employee's arrest, etc., that will be made available to school and department administrators. The creation and use of such a document will ensure the fair, consistent and legally sound application of discipline district wide.

Recruitment and Retention – Instructional Staff

Status:

The Coordinator of Diversity and Recruitment is responsible for addressing the task of recruiting teachers who are needed to fill existing and projected vacancies. In addition to performing these functions, the Coordinator is identified by School Board policy as the district Compliance Officer. Based upon information obtained during this study, the Coordinator of Diversity and Recruitment is committed to designing and implementing recruitment strategies in order to develop a larger, more talented racially and ethnically diverse teacher candidate pool from which to staff the diverse needs of the district.

The FADSS consultants were provided with several documents and supporting information related to the recruitment and retention efforts that are currently in place in Manatee County. A recruitment packet consisted of various published materials that addressed how an applicant can apply for teaching positions, the current teacher salary schedule, a summary of employee benefits that are provided by the district, and several flyers that provided information related to "Building Your Career" in Manatee. Additionally, the packet contained a summary of the New Educator Induction Program which contained

information about the New Educator Programs, and the Professional Development Competencies and Certification Program.

Prior to the on-site visit, the Chief HR Officer provided the FADSS consultants with multiple documents for review. One of these documents was entitled the Recruitment and Retention Plan for the 2018-2019 school year which was developed on April 27, 2018. The plan contained information related to the recruitment and retention efforts of the district, a recruitment schedule and other supporting efforts. The plan also reflected a recruitment and retention budget narrative that indicated \$30,000.00 was budgeted for the 2018-2019 school year. However, it was somewhat concerning that the Coordinator of Diversity and Recruitment was not aware of the exact amount of funding that had been budgeted for instructional recruitment for the 2018-2019 school year.

The consultants also reviewed the Manatee County Schools Recruitment Calendar for the 2018-2019 school year. The schedule listed twenty (20) recruitment events/job fairs which were scheduled for attendance by district staff. Of those events two (2) were identified as governmental or business job fairs, with one (1) being a support staff job fair, and two (2) external job fairs hosted by Manatee County Schools. The remaining 15 scheduled recruitment events, which were scheduled from November to early June, were either in-state or out-of-state college, university or state recruitment fairs which were designed to attract candidates from the field of education. Those listed as participants in the above referenced recruitment events consisted of HR administrators, staff from the Teacher Development office, district level administrators and several high school and/or elementary principals.

It was also determined that Manatee County does offer "advanced contracts" to critical needs instructional candidates who are identified as outstanding candidates for employment. At the time of the FADSS on-site visit to Manatee County, it was reported that five (5) advanced contacts had been offered to date for the 2019-2020 school year.

The Coordinator of Diversity and Recruitment recognizes that a successful recruitment plan requires specific strategies that should be evaluated annually to determine the effectiveness of each strategy in order to ensure the highest return on investment. It was reported that there has been some expansion of the district's instructional recruitment plan over the past year or so. However, the specific strategies used within the district are not identified in a formal fully documented instructional recruitment and retention plan, and an annual evaluation of those current strategies was not apparent to the FADSS consultants.

Recommendations:

Over the past several years, the job of teacher recruitment and retention has become the most competitive task that will face any school district in Florida, and across the nation. The current recruitment challenge is no longer isolated to critical subject area needs or diversity needs, it has expanded to a shortage of instructional staff in the majority of our subject area and/or level needs. While district and school-based administrators are aware

of the challenges regarding teacher recruitment and retention, it must be recognized that the dwindling teacher candidate pool will present an even greater challenge for all public schools across the country, especially small and rural districts. Historically, HR departments across the state have focused on the seasonal task of staffing instructional vacancies that are needed at the beginning of each school year. However, in today's environment, many school districts are faced with a continuous need to fill vacancies throughout the school year. Without a formal year-round recruitment and retention plan, many vacancies will be filled with substitute or long-term substitute teachers which often result in students receiving fragmented or inconsistent instruction.

The following recruitment and retention strategies are provided for consideration. It is acknowledged that several of these recommended recruitment and retention strategies contained within this section are currently in place or used in part in Manatee County. However, a more formal, published and district approved plan, which is evaluated on an annual basis in order to determine effectiveness, is needed in order to provide positive results that meet the instructional staffing needs of the Manatee County School district.

Recruitment Strategies

Recruitment Team

The district should move toward establishing and maintaining a racially and ethnically diverse recruitment team. The membership of the team should be reviewed on an annual basis to assure that there is appropriate representation with respect to race, academic specialization and instructional levels while maintaining consistency of membership to the degree possible. As selected by district level administration, alternate team members who attend and participate in on-campus recruitment fairs and make presentations to education majors at various colleges/universities.

It is recommended that members of the Recruitment Team be comprised of:

- HR administrator who is responsible for the district's recruitment and retention plan
- School-based administrators consisting of principals and assistant principals
- District level subject area administrators within the instructional division
- Current teachers who are alumni of the colleges and universities identified on the recruitment schedule
- Community / business partners

Recruitment Guide

Each member of the Recruitment Team should complete an annual orientation session related to the strategies and procedures associated with the district's Recruitment and Retention Plan. These orientation sessions should contain information relative to the district's Board adopted salary schedule with information related to placement on the salary schedule, and the benefits package that would be applicable to new teachers hired

into the district. Additionally, the material should contain applicable web/URL addresses, flyers and/or pamphlets that provide information pertinent to local Chamber(s) of Commerce offices, local realtors, housing opportunities, and associated community services for dissemination at the on-campus recruitment fairs. Each recruiter will also receive and be instructed on the use of an Instructional Interview Guide, a Personal Interview Form, the Notice of Nomination Form (Advanced Contracts), and material designed to guide the recruiter with respect to appropriate questions to ask during the interview.

Clear and accurate communication with the applicant or potential new hire regarding employment is one of the primary objectives of each recruiter. Giving incoming applicants an accurate picture of the district and the district's needs is extremely important.

District Network / Partnership with Colleges and Universities

In order to maintain a close positive relationship with all area and out of state colleges and universities for on-campus recruitment purposes, efforts should be made during each college/university visit to meet with the Deans of the Colleges/Schools of Education. An invitation should be extended to send students to Manatee County to complete their student teaching requirements. If the student is from out of state or out of area, a commitment should be made to provide a teacher or administrator to monitor/oversee the student's progress, and report the same back to the College/School of Education. In order to keep network partners updated as to the need of the district, pertinent materials and critical needs areas should be sent on a routine basis. Personal communications with college/university contacts should be standard procedure.

The primary goals of these efforts should be to heighten awareness of the current and future instructional staffing needs of the district, and to acknowledge the willingness of the district to accept all requests for intern placements. Additionally, the district's Recruitment and Retention Plan should be presented and discussed with college/university contacts. Following the review of the plan, all input received from the participants should be used to enhance or develop new recruitment and retention strategies.

Promote Your District's Culture

The key to recruiting millennials focuses on building your brand awareness through specific items such as testimonials. Deploying quick and simple surveys asking your instructional staff about the pride they feel from working in the district will be impactful. Providing those positive results via social media will attract candidates and may be the deciding factor with regard to candidates who are seeking employment in your region.

On Campus Recruitment Fairs

Recruitment trips to various colleges and universities should continue to be scheduled by HR. The primary goal of this strategy is to select and attend colleges and universities that

will result in the hiring of a diverse faculty that will provide an abundance of the educational benefits to all students in the district. The criteria used to select college and university recruitment fairs that will be attended during the school year should include but not be limited to:

- The recommendations of other Florida school district recruiters
- The success rates experienced by Manatee County from previous recruitment trips
- The historically Black institutions identified as producing a large percentage of education majors based upon data received from the Florida Department of Education
- The top-rated institutions identified as producing a large percentage of education majors based upon data received from the Florida Department of Education

Based upon authorization from the HR department, each member of the Recruitment Team who is an administrator in the district should be authorized to issue a Notice of Nomination (Advanced Contract) to any critical area need candidate(s) based upon his or her determination that the candidate will be an asset to the district.

College / University Recruitment Presentations

Recruitment Team members, and/or members of the Recruitment and Retention Advisory Committee should schedule presentations at local colleges and universities to provide information regarding "Building Your Career" in Manatee County. The major purpose of these presentation is to encourage the students to consider teaching as a viable career choice. The students should be given information relative to the critical teaching shortage areas in the district.

Additionally, the presenters would encourage the students to consider substitute and/or part-time employment with Manatee County Public Schools in order to become acquainted and associated with the district. From these employment opportunities in positions such as classroom assistants and substitute teachers, subsequent full-time employment contracts may materialize.

Intern Program

Early and close association with all student interns by the school principal and members of the Recruitment Team is a prerequisite to the successful recruitment of student interns. Education majors completing their internship within the district are and will continue to be a major source from which to increase the supply of teacher candidates. The district should establish several major goals associated with this program which include:

- Written communication with the Deans of Colleges of Education and the college Coordinators of Student Placement at all colleges and universities

- Group meetings with all education majors from local colleges and universities to develop a close association with the interns prior to the scheduled on-campus recruitment fairs
- Video presentations developed by the district targeting the life style in Manatee County and employment opportunities within Manatee County Public Schools
- Presentations that identify the specific hiring needs as identified for the current year, the subsequent year and future years based upon teacher turnover rates and student growth patterns
- Meetings as needed to accommodate the placement of all interns interested in completing internships within the district during each semester
- Expanding internship opportunities to include summer school sessions for any intern who is in need of such experience
- Any intern, in a critical need area, who is identified by the building principal as being an outstanding candidate for employment should be issued a Notice of Nomination (Advanced Contracts) for employment in the current or forthcoming school year at any time during the internship period

Intern Visitation Program

The HR department should provide a current list of all active interns to a variety of administrators to include but not limited to district level Directors, Executive Directors, the Superintendent, and School Board Members. It is the goal of this strategy that these individuals will, as schedules allow, conduct brief classroom visitations and encourage interns to make application for employment within the Manatee County Public School system.

E-Mail Campaign

Following the on-boarding of all new instructional staff members, each new member should receive a personal communication from the top-level HR administrator welcoming them to the district. Additionally, each new teacher to the district should receive a New Teacher Survey within several weeks of his or her initial employment period with the district. The new teacher would be asked to complete and return the survey to the administrator over recruitment and retention. The results should be compiled and reviewed to determine what strategies can be developed to improve the initial employment experience and/or addresses any negative feedback that may be received.

Additionally, an annual e-mail campaign should be developed to target and maintain close professional relationships with:

- Deans of the Colleges/Schools of Education.
- These communications would include a request for the names, phone numbers, and addresses of all graduating education majors. Candidates in areas of critical shortage should then receive a communication offering the opportunity for a personal interview with a member of the Recruitment Team.

- Interns who are completing their internship in the district.
- Each intern placed within the district should receive a form of communication from the top-level HR administrator welcoming them to the district and identifying any upcoming meetings and/or visits that will be conducted for interns.

Vacancy Advertisements

Now more than ever school districts must realize the importance of publicizing their vacancies across a broader marketplace that reaches thousands of potential applicants, and further, school districts must support these efforts with the needed funding.

Additionally, and equally important, more and more school districts are marketing and extending employment offers in the fall and early winter. It is never too early to begin recruiting. School districts with a practice of posting instructional vacancies for the upcoming school year late in the school year and early summer will see a diminished candidate pool with regard to quantity and quality.

Various sites such as Topschooljobs.com, K12jobspot.com, Jobing.com, Indeed.com, Careerbuilder.com, Teacher-teacher.com, HispanicJobs.com, the National Alliance of Black School Educators, and the National Society for Hispanic Professionals are widely known for attracting critical area needs and minority applicants. Additionally, school districts should work to establish avenues that can provide vacancy postings on the campuses of colleges and universities that produce a large number of education majors.

In many school districts, vacancy advertisements are commonly posted on the HR homepage. In many cases, locating and accessing these vacancy postings are troublesome for potential applicants. In order to address this concern, the Manatee School District should ensure that their job vacancy postings are "boldly" identified on the district's home page and on the HR home page.

Developing and providing an on-line video that provides information relating to all aspects of becoming a teacher in the district is an effective recruitment tool. The video should provide a brief summary of the application process, what to expect after completing an application, and most importantly, the video should present specific information related to the financial incentives and other compensation benefits that are provided by the school district.

Notice of Nominations (Advanced Contracts)

A Notice of Nomination (Advanced Contract), once signed by the candidate and the recruiter, constitutes an official agreement that the candidate will be employed in the district for the current or forthcoming school year contingent upon the candidate meeting all requirements related to employment. The formal district Contract for Employment is issued following official Board action on the recommendation for employment as submitted by the Superintendent.

It is noted that Manatee County does have an established practice of issuing "Advanced Contracts" to candidates in areas of critical shortage, and other candidates who are identified as outstanding candidates for employment in any academic area who are being recruited by the district or who are seeking employment in the district. At the time of the on-site visit, records indicated that 5 advanced contracts had been issued for the upcoming 2019-2020 school year. As this is one of the most successful and proven recruitment strategies used by school districts, the district should seek to expand offering these contacts as staffing needs dictate.

Notice of Nominations (Advanced Contracts) may be given:

- To successful candidates as identified at on-campus recruitment fairs
- To outstanding interns at any time during their internship experience
- To walk-in candidates who are identified as a critical area need and are recommended following an interview with an administrative Recruitment Team member

Further, Notice of Nominations (Advanced Contracts) could be issued to any critical area need teacher by a school principal / assistant principal or any Recruitment Team member with the approval of the Superintendent or his/her designee.

Florida Future Educators of America

In an effort to "Grow Our Own Teachers", HR and appropriate school level administrators should support the growth or establishment of Florida Future Educator Association (FFEA) clubs in all high schools. In order to establish and/or increase student membership in such clubs, district/school administrators and club sponsors should support these efforts by conducting membership drives on an annual basis.

One of the primary goals should be to increase the membership and diversity of the FFEA clubs. Additional goals would include enhancing the image of teaching as a profession, establishing or maintaining strong club memberships, providing for hands-on experiences, and promoting career opportunities in the field of education.

Signing / Relocation Bonuses

Manatee County should strongly consider establishing a signing/relocation bonus program for critical need area instructional recruits. On an annual basis, the Superintendent would identify the critical area needs. Additionally, through the established budgetary process, the Superintendent would request funds to support the issuance of Signing/Relocation Bonuses in an amount as determined by available funds. These bonuses would be awarded to new teachers who accept offers of employment in areas of critical shortage. These bonuses should be limited to one per qualified candidate should the candidate be identified as meeting more than one of the areas of critical shortage.

The Signing/Relocation Bonus would be payable to the new teacher at a time subsequent to clearance for employment, acceptance of a contract as evidenced by the signature of the teacher on the Contract of Employment, and remaining employed for a specified period of time as determined by the district. Authorization for payment would be approved by a senior level HR administrator.

Teacher Salaries

In order to be competitive with other surrounding school districts, the District should constantly evaluate the existing teacher salary schedule. The evaluation should include an analysis of the beginning teacher salary as well as all other salary slots. The district's salary schedule should be improved annually to the highest degree possible based upon available funds that can be identified for salary improvements.

Retention Strategies

New Teacher Mentor Program

Based upon the information obtained, it is recognized that Manatee County has a supportive new teacher mentor program. The district should continue this program and strive to pair experienced high performing teachers with new teachers. Including a school-based administrator as a member of this support team would provide the new teacher with additional assistance and support from the school's administration. The mentor and administrator would assist the beginning teacher with school procedures and policies, and provide support for the new teacher so he/she will be able to demonstrate the instructional competencies required in the program. In many school districts, the responsibility for this strategy is assigned to appropriate staff within the Curriculum/Professional Development department in collaboration with the district's recruitment and retention administrator.

School districts should closely examine the assignments that are given to new beginning teachers. The research on new teacher assignments often cites the challenges they face when selected and hired for high-needs schools, and when new teachers are assigned multiple preparations for their first teaching experience. If such assignments cannot be avoided, it is imperative that additional intensive support be provided.

Additionally, the Department of Human Resources, with support from the Curriculum/Professional Development department, should provide extra support to critical needs area teachers as these teachers are of primary concern relative to recruitment and retention. Following any training or support sessions, the district should provide an opportunity for participants to provide feedback with regard to the effectiveness of the sessions. Should any beginning teacher experience problems or express concerns relative to the delivery of instruction or classroom management, school or district resource teachers should be assigned in order to facilitate collective problem-solving activities.

The district should ensure that mentors, on a consistent schedule, follow through with their commitment to support the work of first year and new to the district teachers.

Exit Interviews or Questionnaires

This highly effective strategy helps identify any common factors that exist which influence teachers to end their employment with the district for reasons other than normal reasonable separation reasons such as retirement, relocation, etc. Should the data collected identify that certain negative factors influenced the separation of employment, then corrective strategies must be developed to address those concerns.

Based upon the information obtained during the on-site review, and as addressed previously in this report, it was determined that the district has developed a "draft" Exit Survey and a Stay Survey which are intended to gather information related to why employees leave the district and why employees stay in the district. It was unclear as to whether the use of these surveys had been 1) approved for use in the district 2) were being used as a standard practice or 3) were intended to gather information from all employee groups or just instructional staff. Establishing these surveys as a part of the comprehensive retention plan will be beneficial.

Recruitment and Retention Advisory Committee

Manatee County should consider establishing a formal Recruitment and Retention Advisory Committee. Committee members would participate in the development and implementation of annual strategies that are designed to recruit, hire, and retain a diverse high performing faculty. The committee members would consist of district principals, assistant principals, executive directors, HR administrator(s), exceptional student education administrators, and community members. This committee would also participate in the annual evaluation of the district's recruitment and retention plan, and provide feedback with regard to improving existing strategies, providing suggestions for new strategies and/or recommending that certain strategies be eliminated based upon a lack of productivity.

In summary, once a formal recruitment and retention plan is developed, and for that plan to be successful, each strategy should be evaluated annually to determine the effectiveness of that strategy. Therefore, for efficiency, effectiveness and transparency, it is recommended that the district consider compiling one document that represents their comprehensive Teacher Recruitment and Retention Plan. This document would be very beneficial when the need arises to present all of the district's efforts regarding recruitment and retention to the Superintendent, School Board, School Administrators, Recruitment and Retention Advisory Committee, Recruitment Team, college/university partners and/or individuals from outside the district who have an interest in seeing the plan. Additionally, a compiled written plan will be extremely valuable when the district conducts the annual evaluation of each strategy to ensure the "highest return on investment", and identify the most successful strategies that are developing a larger, more talented racially and ethnically diverse teacher candidate pool from which to staff the diverse needs that exist within a variety of instructional settings in the district.

Suggestions for Immediate Implementation

Many of the issues that arose during the HR Study will require extended time and effort by both district and Human Resources leadership. It is recognized that a paradigm shift from changing the HR Department into a transformational entity verses just a transactional entity cannot be accomplished overnight. However, the team believes that there are steps that can be taken immediately or over a short period of time that will have a positive effect on the delivery of HR services. The suggestions are listed below for consideration and will not require much in the way of funding. (Please note that many of these suggestions are described in more detail in other sections of the report.)

1. Communicate to HR staff that they primarily serve principals and schools and that they are accountable for responsiveness to the HR needs of their primary customer.
2. Establish an ongoing HR/Principal Advisory Committee. This committee should initially focus on a review of current HR processes and procedures and implement changes as needed that will improve the delivery of those services. The recent HR survey completed by school principals can provide a beginning point for the committee. An initial topic could be a review of the current hiring/ onboarding process.
3. The current "Who to Call" list should be modified and expanded to indicate the specific job title, role and responsibilities of each staff member. This information should be distributed to all schools on an annual basis, and updated throughout the year if changes in staff and/or staff responsibilities occur. A similar "Who to Call" list should be a feature that is developed by every district level department and readily provided district wide. These listings should be readily accessible from the home page of each department.
4. Prepare and distribute a yearlong HR calendar of critical dates for administrators. It should be noted that an HR Personnel Hiring Timeline Calendar for 2019 was created, however it was unclear if it was ever finalized or distributed since it appeared to be in a "Draft" form only as of 2/20/19.
5. Currently, the district does not have an approved Employee Handbook. However, it was reported that a DRAFT employee handbook had been developed in January of 2019. Upon request, the FADSS consultants obtained a copy of the DRAFT handbook for review. Based upon an initial review of the handbook, the contents are appropriate, expansive and will be of great resource for district employees. Actions should immediately be taken to finalize and adopt the handbook following a review by legal counsel.
6. Individual HR staff should be accountable for data errors as well as courteous and timely communication.
7. Immediate attention should be given to finding ways to speed up the on boarding process.
8. Create and distribute a checklist outlining the hiring process including required documents and timeline.

9. Provide school principals and administrative secretaries immediate access to critical and pertinent People Soft data.
10. In an effort to improve communication with customers, each HR staff member (as well as staff members from all other district departments) should update his/her voice mail on a daily basis. If a call is not able to be answered, the recording would inform the caller that 1) the staff member is currently on the line and will return the call as soon as possible or 2) that the staff member is out of the office for part (or all) of the day and that the call will be returned upon the return to the office or 3) that the call can be transferred to the staff member's back up. Extended absences should also be identified on a staff member's email, again identifying the staff member's back up. The expectation should be that phone calls will be returned on the same day and that emails be returned within 24 hours of receipt.
11. Currently, a retired Manatee County teacher is required to complete the entire substitute application process should he/she want to become re-employed as a substitute teacher after becoming eligible per the established FRS rules. This requirement should be modified in order to make it easier for recently retired teachers to become substitutes. At minimum, a retired Manatee County teacher should complete fingerprinting/background clearance, drug testing, provide validation of proper certification and evidence of effective performance evaluations as all other personal data should already be on file and maintained by the district.
12. A new pay stub has recently been issued to employees as part of the People Soft implementation, generating many calls from employees to the payroll and HR departments. Additionally, school secretaries are often asked by employees at their school to provide an explanation of information that is reflected on the pay stub. A sample pay stub should be posted on line as soon as possible with an explanation of the new information provided especially with respect to the information that is provided in the area of "Hours and Earnings". Notification of this posting should be distributed to all schools and departments.

Conclusion

It is obvious that the shift from a typical transactional/compliance driven personnel office to a Human Resource function that is fully aware of its place in securing the best and brightest to staff schools and classrooms is cultural in nature as well as procedural. It requires a mindset shift. Human capital and the district office must become customer oriented and service driven.

It is hoped that the review team recommendations will assist the district in achieving a truly transformational HR operation. District leadership is encouraged to provide the necessary staff and resources to HR in order to support the continuing development of a transformational HR department, which when used well can be a valuable resource in achieving the vision and goals of the district. The team recognizes that refocusing HR may be challenging and that the conversion from a predominately transactional and

compliance driven operation to a more strategic and supporting partnership may take some time. However, there are certain areas and recommendations which are addressed in this report that can be have an immediate impact on providing the highest degree of customer service.